

# Department of Finance: MC311 Data Review

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6/7/2011

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Department of Finance

# CountyStat Principles

- **Require Data-Driven Performance**
- **Promote Strategic Governance**
- **Increase Government Transparency**
- **Foster a Culture of Accountability**



# Agenda

- **Finance/ MC311 Transition Overview**
- **Overview of Customer Request Procedures**
- **Review of Finance Related Customer Request Data**
  - Customer Request Intake Method
  - Finance Customer Request Volume
  - Customer Requests by Call/Web Portal Type
  - Customer Requests by Area Type
  - Customer Requests by Top Sub Areas
- **Review of Finance Related Service Request Data**
  - Service Requests by Area Type
  - Service Requests by Top Sub Areas
- **SLA Completion Time Frames**
- **Improving Existing Practice**
- **Wrap-Up and Follow-Up Items**



# MC311 Nomenclature: Categorizing Customer Intake

A Customer Request in MC311 is simply a record that is created when a resident contacts the 311 Call Center requesting service.  
(Customer Requests were previously called “service requests”.)

The types of MC311 Customer Requests can be categorized as follows:

- **General Information (GI):** These calls typically constitute 50% of a Customer Service Center’s (CSC) calls and deal with responses to Frequently Asked Questions (FAQs); provide static information about policies and procedures, County government events, and operations.
- **Referrals (REF):** These calls typically constitute 25% of a Customer Service Center’s calls and provide constituents with the telephone number for a call requiring “subject matter expertise” and perform a “warm transfer” of the call, if required.
- **Service Requests (SRs):** These calls typically constitute 20% of a Customer Service Center’s calls. A service request is created for a department to fulfill a resident’s request.
- **Miscellaneous Comments / Compliments / Complaints:** These calls typically constitute 5% of a Customer Service Center’s calls and typically document the nature of the comment, compliment, or complaint and are visible to the specific department.

The use of the term “Service Request” to categorize multiple types of interactions within MC311 was a cause of confusion, thus the totality of all interactions are now categorized as “Customer Requests.”



# Finance Call Center Transition to MC311

- Four Department of Finance Treasury Division staff transferred to MC311 on November 2009.
- Transferred Finance agents serve as Tier 2 Customer Service Representatives (CSR) to answer questions that require a higher level of subject matter expertise and access to the MUNIS system.
- Five additional CSRs have been trained on and provided access to the MUNIS system and were added to the Tier 2 FIN queue in December 2010.
- MC311 now has a total of nine FIN Tier 2 CSRs and plans to add more CSRs to the queue.



# Overview of Customer Request Procedures

## Processed at Customer Service Center by MC311

- General information, Payment Dates, Tax Sale, Refund (if completed and noted in MUNIS), definition of charges (ex. Solid Waste Charge especially when not receiving County trash pick-up)
- **Example:**
  - Resident calls about a tax bill, MC311 answers the call and provides information from the Knowledge Base Article that is in Siebel. If necessary, a CSR will then access the Finance website and/or MUNIS system to provide an answer.

## Sent to Finance as Service Request

- Refund request and details, miss-applied payment, tax clearance personal property, payment tax research, risk management
- **Example:**
  - Resident request requires Finance access to additional systems (Lender Site, ePilot, the Assessment System, Oracle eBusiness, Cashiering, etc) to handle inquiries from banks, mortgage lenders, investors, attorneys, county constituents, and other parties.



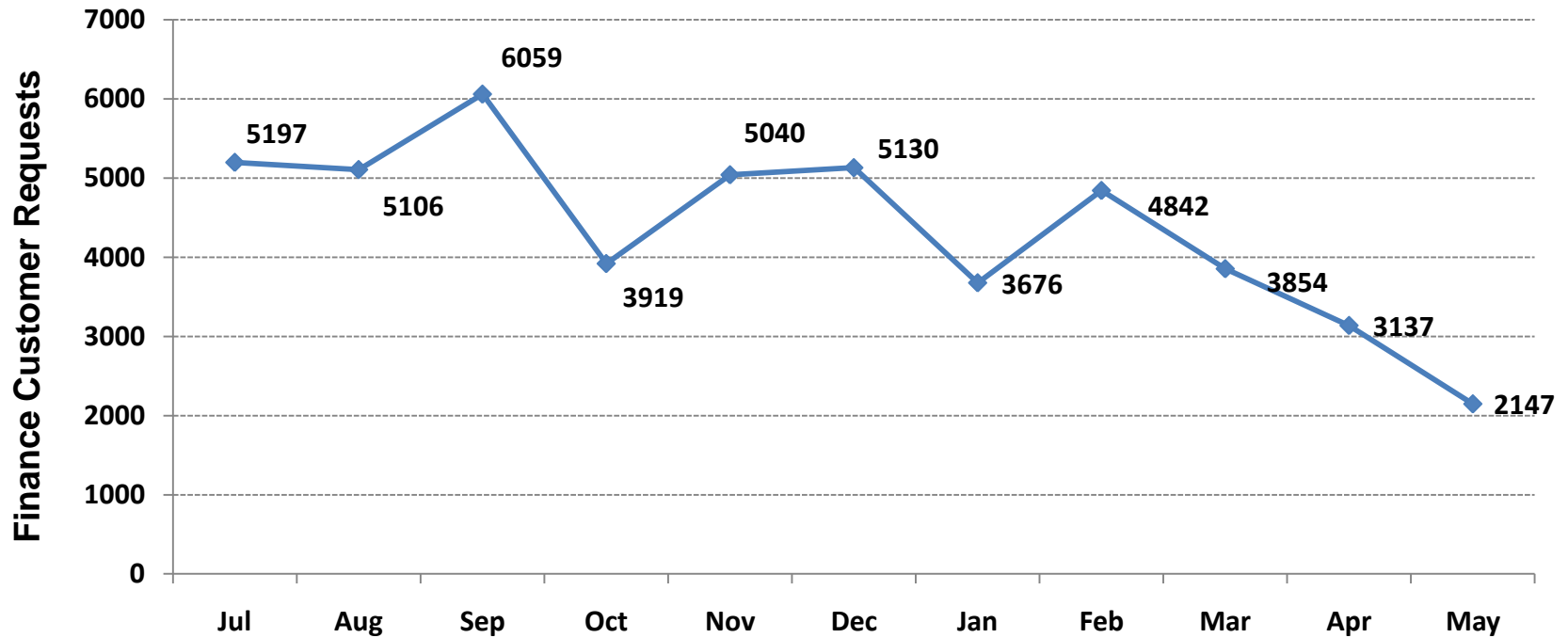
# Overview of Finance Customer Request Findings

- Customer request data demonstrates seasonal trends associated with the tax billing cycles
- Finance customer requests account for an average of 9% of total MC311 customer request volume
- Practically all of the customer requests (99.5%) are generated via a phone call
- Only 5.5% of customer requests result in the creation of a departmental fulfilled service request



# Finance Monthly Customer Request Totals

Customer Request Totals

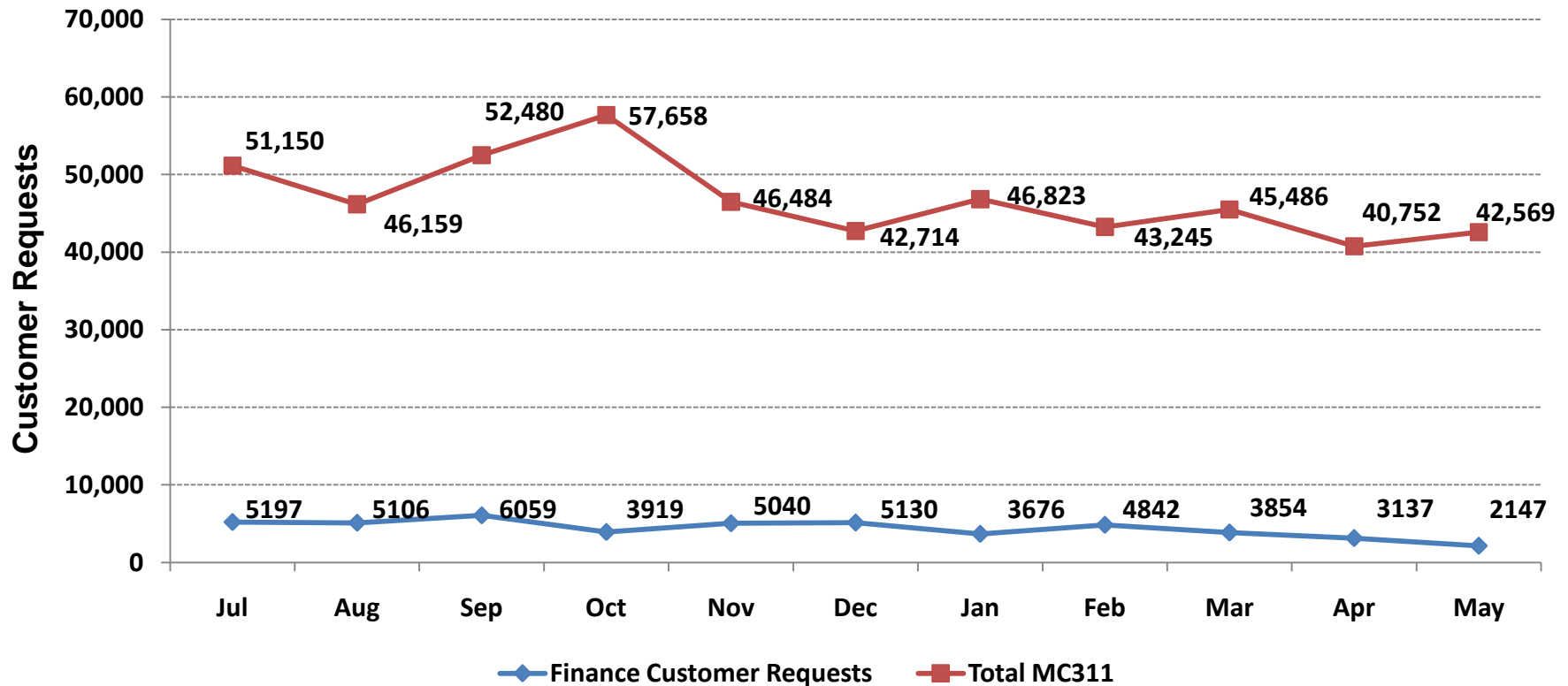


|                | July-Aug | Aug-Sep | Sep-Oct | Oct-Nov | Nov-Dec | Dec-Jan | Jan-Feb | Feb-Mar | Mar-Apr | Apr-May | July-May |
|----------------|----------|---------|---------|---------|---------|---------|---------|---------|---------|---------|----------|
| Percent Change | - 2%     | 19%     | - 35%   | 29%     | 2%      | - 28%   | 32%     | - 20%   | - 19%   | - 32%   | - 142%   |





# Finance Related Customer Requests as Percentage of Total MC311 Customer Requests



|                             | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May |
|-----------------------------|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Finance as Percent of Total | 10%  | 11% | 12% | 7%  | 11% | 12% | 8%  | 11% | 8%  | 8%  | 5%  |



# Customer Request Intake Method for Finance Related MC311 Customer Requests

Phone calls are the most frequent avenue for Finance-related Customer Requests accounting for 99.5% of all customer request intake type

|          | July  | Aug   | Sep   | Oct   | Nov   | Dec   | Jan   | Feb   | Mar   | Apr   | May   | Total  |
|----------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------|
| Internal | 16    | 24    | 26    | 15    | 57    | 31    | 7     | 8     | 6     | 5     | 2     | 197    |
| Phone    | 5,175 | 5,080 | 6,030 | 3,900 | 4,983 | 5,096 | 3,667 | 4,831 | 3,845 | 3,126 | 2,140 | 47,873 |
| Web      | 6     | 2     | 3     | 4     | 0     | 3     | 2     | 3     | 3     | 6     | 5     | 37     |



# Finance Monthly Customer Request Totals by Type

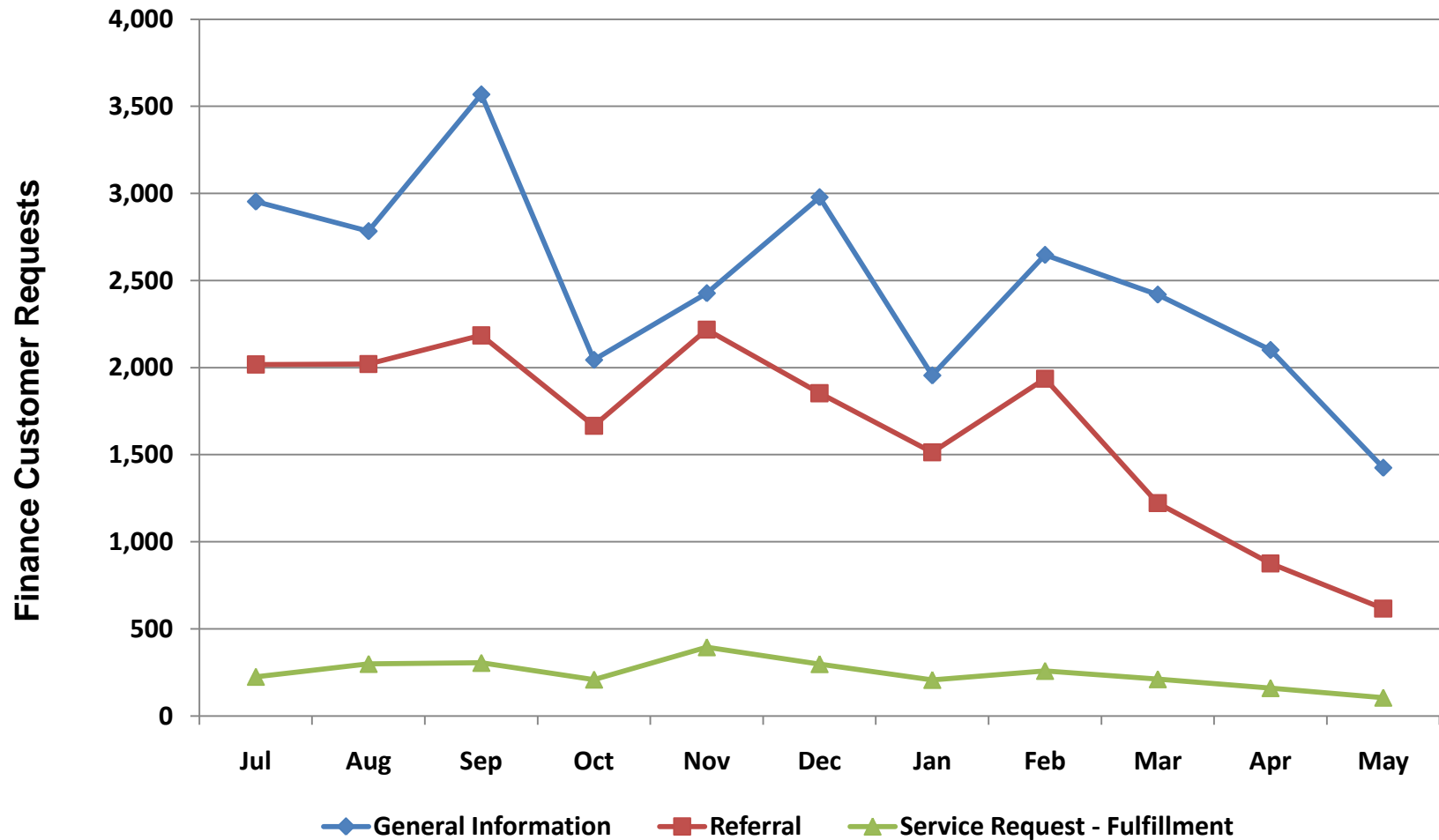
|                          | July | Aug  | Sep  | Oct  | Nov  | Dec  | Jan  | Feb  | Mar  | Apr  | May  | Avg. | Grand Total |
|--------------------------|------|------|------|------|------|------|------|------|------|------|------|------|-------------|
| Complaint/<br>Compliment | 1    | 3    | 1    |      |      | 1    |      |      | 2    |      | 1    | 2    | 9           |
| General Information      | 2953 | 2783 | 3568 | 2044 | 2427 | 2978 | 1955 | 2647 | 2419 | 2101 | 1425 | 2482 | 27300       |
| Referral                 | 2018 | 2021 | 2185 | 1666 | 2218 | 1853 | 1514 | 1936 | 1222 | 876  | 616  | 1648 | 18125       |
| Service Request          | 225  | 299  | 305  | 209  | 395  | 298  | 207  | 259  | 211  | 160  | 105  | 243  | 2673        |
| Grand Total              | 5197 | 5106 | 6059 | 3919 | 5040 | 5130 | 3676 | 4842 | 3854 | 3137 | 2147 | 4373 | 48107       |

57% of all Finance Customer Requests are general information calls.

91% of all referrals are related to real property questions.



# Finance Monthly Customer Request Totals by Type



# Overview of Finance Customer Request Area and Sub-Area Findings

- The real property area is the major contributor, which accounts for 86% of all Finance Customer Requests
- As the major source of customer requests, the associated trends in real property requests mirror overall changes
- Within the real property area, the two largest sub-areas are general information and billing inquiry
- From July through October, each of these sub-areas demonstrated significant changes in overall volume



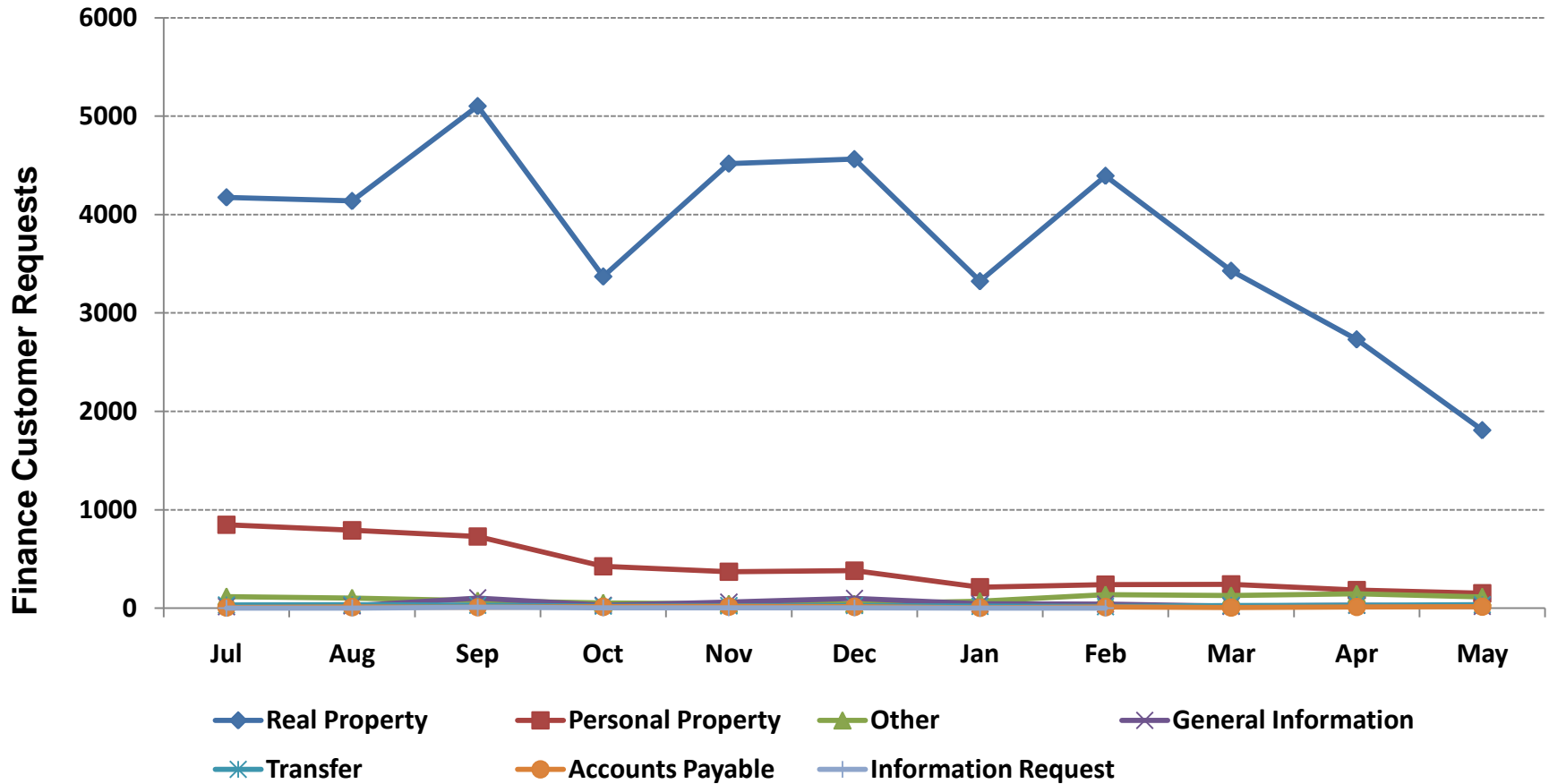
# Finance Monthly Customer Request Totals by Area Type

|                     | July | Aug  | Sep  | Oct  | Nov  | Dec  | Jan  | Feb  | Mar  | Apr  | May  | Average | Grand Total |
|---------------------|------|------|------|------|------|------|------|------|------|------|------|---------|-------------|
| Real Property       | 4175 | 4138 | 5102 | 3371 | 4517 | 4563 | 3323 | 4394 | 3429 | 2732 | 1810 | 3778    | 41554       |
| Personal Property   | 847  | 791  | 729  | 425  | 370  | 381  | 213  | 240  | 242  | 185  | 151  | 416     | 4574        |
| Other               | 118  | 104  | 76   | 54   | 44   | 44   | 71   | 137  | 128  | 145  | 115  | 94      | 1036        |
| General Information | 17   | 24   | 104  | 29   | 62   | 99   | 43   | 42   | 20   | 31   | 19   | 45      | 490         |
| Transfer            | 33   | 36   | 30   | 22   | 25   | 26   | 20   | 17   | 28   | 31   | 36   | 28      | 304         |
| Accounts Payable    | 6    | 11   | 9    | 14   | 17   | 14   | 5    | 11   | 7    | 13   | 16   | 11      | 123         |
| Information Request | 1    | 2    | 8    | 4    | 5    | 3    | 1    | 1    |      |      |      | 3       | 25          |

\* Does not include following Area Types with negligible amount on entries (Cash Management)



# Finance Monthly Customer Request Totals by Area Type



**The real property area accounts for 86% of all Finance Customer Requests.**

\* Does not include following Area Types with negligible amount on entries (Cash Management)



# Finance Monthly Customer Requests Totals by Real Property Sub-Area Type

|                        | July | Aug  | Sep  | Oct  | Nov  | Dec  | Jan  | Feb  | Mar  | Apr  | May  | Grand Total |
|------------------------|------|------|------|------|------|------|------|------|------|------|------|-------------|
| General Information    | 3    | 708  | 2911 | 2180 | 3082 | 3031 | 2264 | 3126 | 2381 | 1860 | 1125 | 22671       |
| Billing Inquiry        | 3206 | 2625 | 1633 | 712  | 839  | 1056 | 647  | 834  | 684  | 521  | 404  | 13161       |
| Refund                 | 78   | 174  | 289  | 226  | 216  | 253  | 218  | 175  | 164  | 95   | 57   | 1945        |
| Tax Sale               | 166  | 182  | 95   | 155  | 118  | 108  | 90   | 103  | 88   | 121  | 143  | 1369        |
| Credits                | 532  | 305  | 91   | 52   | 63   | 54   | 49   | 45   | 74   | 53   | 39   | 1357        |
| Assessment/<br>Appeals | 175  | 125  | 47   | 25   | 44   | 29   | 38   | 38   | 18   | 17   | 11   | 567         |
| (blank)                | 14   | 17   | 32   | 20   | 154  | 29   | 14   | 72   | 20   | 63   | 30   | 465         |

**General information calls about real property usually pertain to property tax bill questions.**

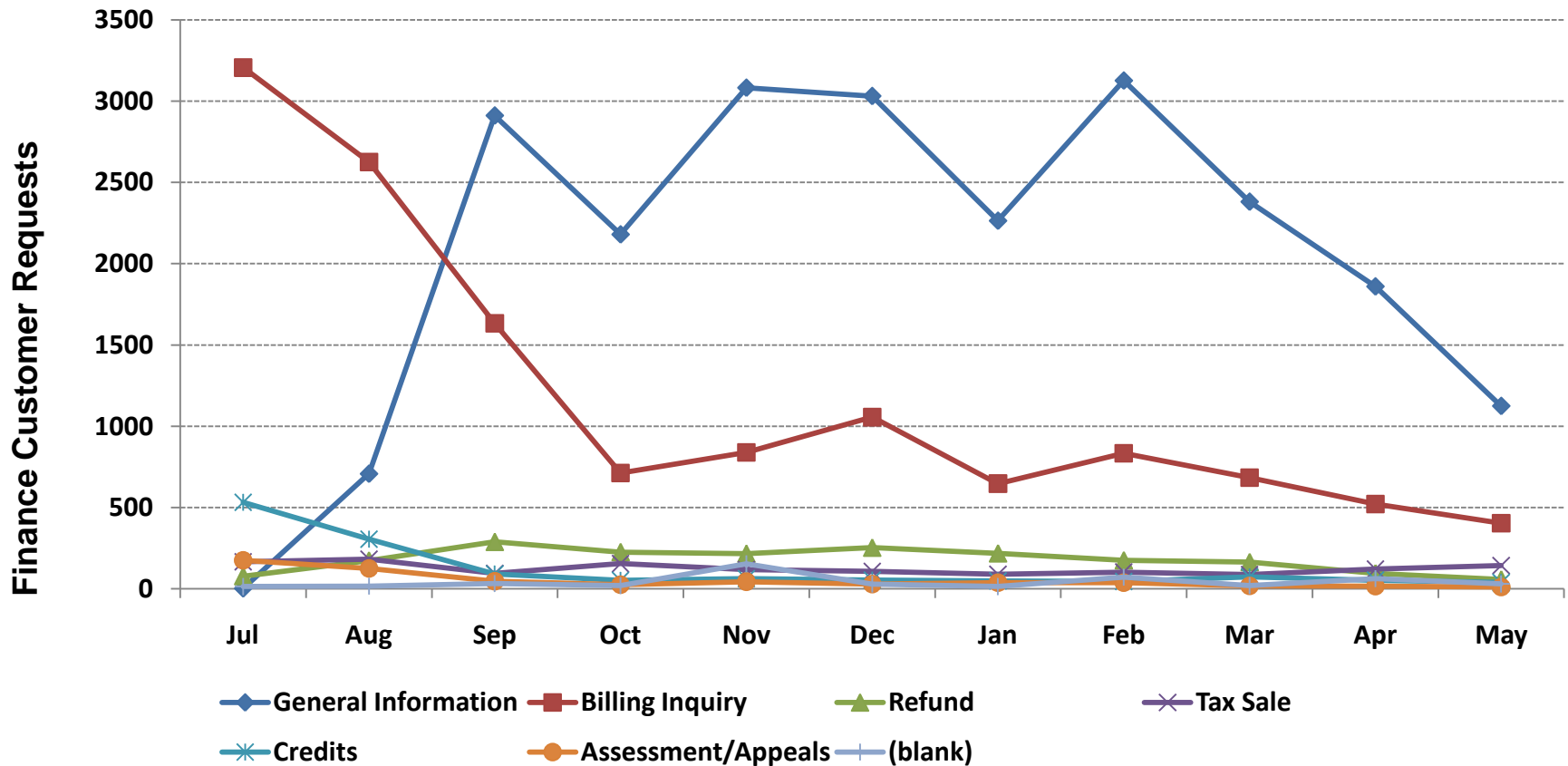
**(e.g. due dates, explanation of charges, mailing address for payment)**

\* Does not include sub areas with negligible entries such as collections and other





# Finance Monthly Customer Requests Totals by Real Property Sub-Area Type



**MC311 attributes broad changes in GI and billing inquiry CRs from July through October to billing cycles.**



\* Does not include sub areas with negligible entries such as 'blank', other, collections.

# Overview of Finance Departmental Service Request Findings

- **Service Requests, sent to the Finance Department, account for 5.5% of all Finance Customer Requests.**
- **Real property related service requests account for 84% of all departmental service requests**
- **The three major sub-areas within real property, general information, refunds, and billing inquires account for 90% of the total real property service requests**



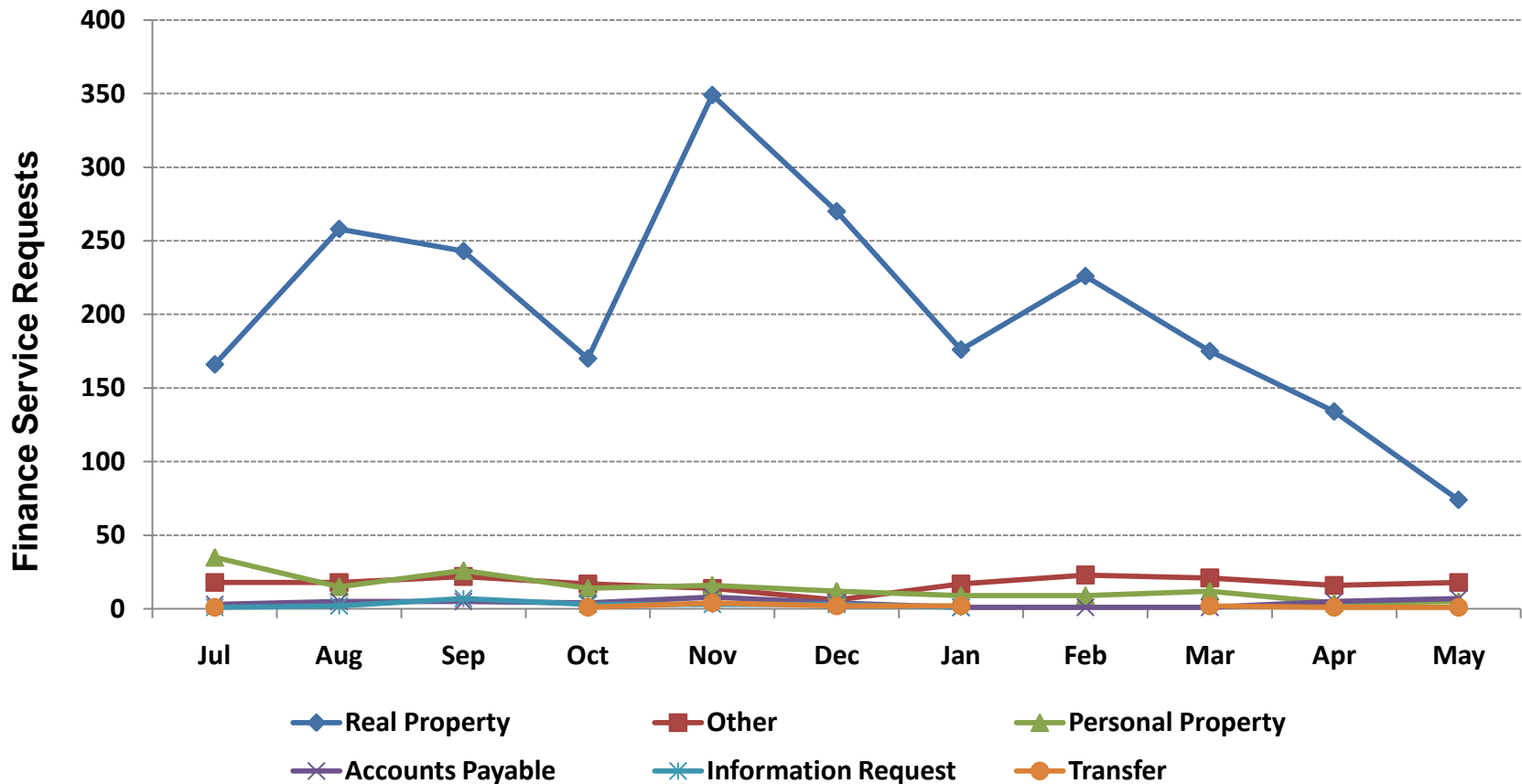
# Finance Monthly Service Request Totals by Area Type

|                     | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Average | Grand Total |
|---------------------|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|---------|-------------|
| Real Property       | 166  | 258 | 243 | 170 | 349 | 270 | 176 | 226 | 175 | 134 | 74  | 204     | 2241        |
| Other               | 18   | 18  | 22  | 17  | 14  | 6   | 17  | 23  | 21  | 16  | 18  | 17      | 190         |
| Personal Property   | 35   | 15  | 26  | 14  | 16  | 12  | 9   | 9   | 12  | 4   | 5   | 14      | 157         |
| Accounts Payable    | 3    | 5   | 5   | 4   | 8   | 4   | 1   | 1   | 1   | 5   | 7   | 4       | 44          |
| Information Request | 1    | 2   | 7   | 3   | 3   | 3   | 1   |     |     |     |     | 3       | 20          |
| Transfer            | 1    |     |     | 1   | 4   | 2   | 2   |     | 2   | 1   | 1   | 2       | 14          |

\* Does not include following Area Types with negligible amount on entries (General Information)



# Finance Monthly Service Request Totals by Area Type



**Service Requests, sent to the Finance Department, account for 5.5% of all Finance Customer Requests.**

\* Does not include following Area Types with negligible amount on entries (General Information )



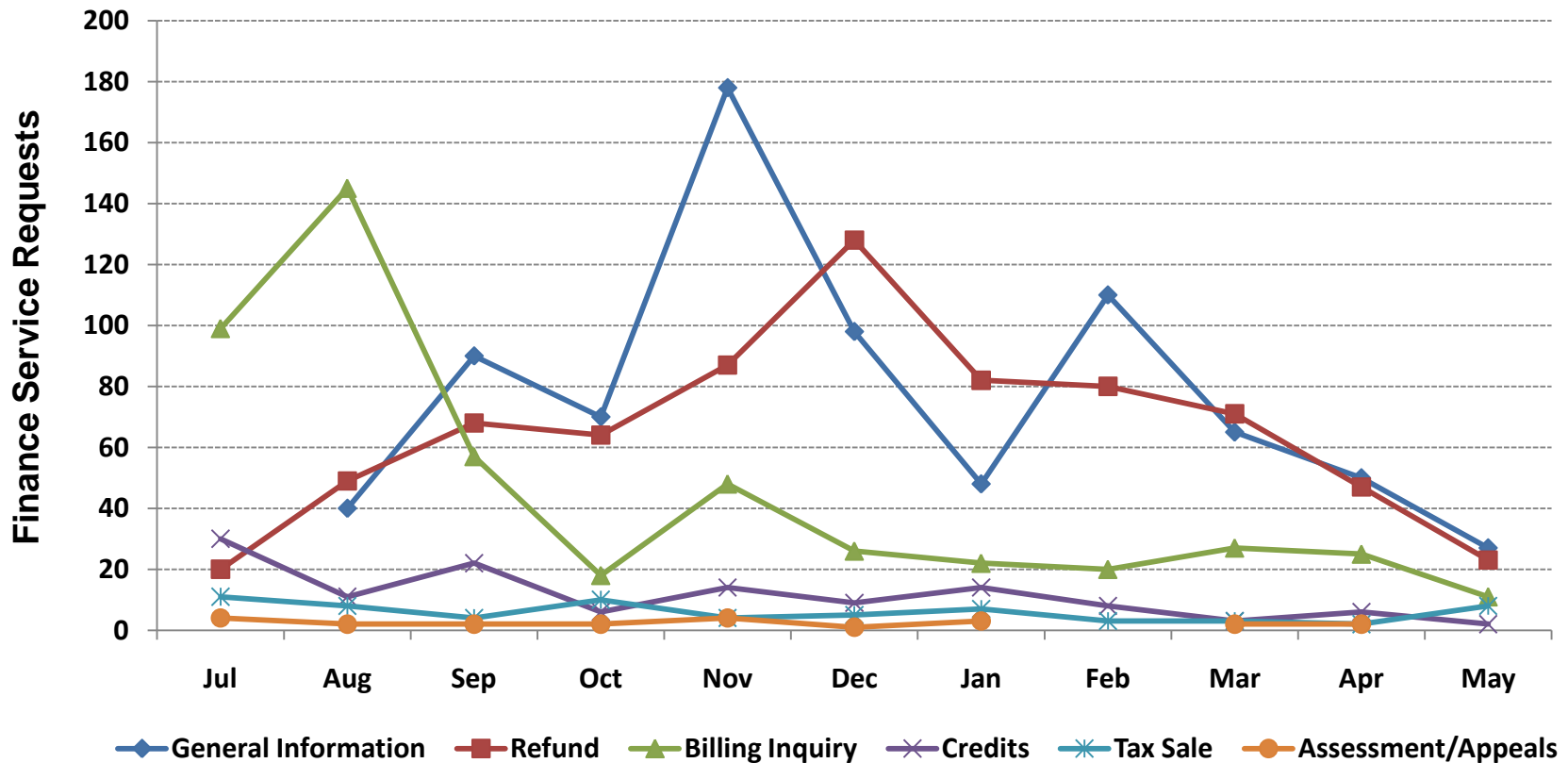
# Finance Monthly Service Requests Totals by Real Property Sub-Area Type

|                            | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Average | Grand Total |
|----------------------------|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|---------|-------------|
| <b>General Information</b> |      | 40  | 90  | 70  | 178 | 98  | 48  | 110 | 65  | 50  | 27  | 78      | 776         |
| <b>Refund</b>              | 20   | 49  | 68  | 64  | 87  | 128 | 82  | 80  | 71  | 47  | 23  | 65      | 719         |
| <b>Billing Inquiry</b>     | 99   | 145 | 57  | 18  | 48  | 26  | 22  | 20  | 27  | 25  | 11  | 45      | 498         |
| <b>Credits</b>             | 30   | 11  | 22  | 6   | 14  | 9   | 14  | 8   | 3   | 6   | 2   | 11      | 125         |
| <b>Tax Sale</b>            | 11   | 8   | 4   | 10  | 4   | 5   | 7   | 3   | 3   | 2   | 8   | 6       | 65          |
| <b>Assessment /Appeals</b> | 4    | 2   | 2   | 2   | 4   | 1   | 3   |     | 2   | 2   |     | 2       | 22          |



\* Does not include sub areas with negligible entries such as 'blank', other, collections.

# Finance Monthly Service Requests Totals by Real Property Sub-Area Type



**Only 5% of the real property customer requests go to the Department of Finance for service request fulfillment.**



\* Does not include sub areas with negligible entries such as 'blank', other, collections.

# Overview of Finance Service Level Agreement (SLA) Findings

- Since July, the overall average net workdays to close a service request is 17 days
- The longest duration to close a request amongst Finance user groups is Risk Management with an average of 104 days
- 12 of the 85 current Finance solution area SLAs are closed, on average within the SLA time frame
- 15 of these solution areas are closed, on average, 30 net workdays or more than the SLA time frame



# Finance Service Request Closure Rate

|  | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May |
|--|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| <b>Service Requests Handled by Finance</b> | 225  | 299 | 305 | 209 | 395 | 298 | 207 | 259 | 211 | 160 | 105 |
| <b>Average Net-workdays* to Close SR</b>   | 20   | 19  | 15  | 20  | 13  | 16  | 21  | 28  | 21  | 10  | 4   |
| <b>SRs Currently In Progress</b>           | 3    | 4   | 6   | 2   | 4   | 3   | 13  | 15  | 24  | 31  | 35  |

**Original SLAs captured time to receive request, future SLAs will measure time to complete request.**

\* Net-workdays is an Excel function that calculates the number of work days between two calendar dates. This function does not take into account holidays. Only services requests that are closed complete are used for this calculation.





# Finance Service Request Net-Workdays to Close by User Group

|                  | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Area<br>Average |
|------------------|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----------------|
| Accounts Payable |      | 53  |     | 8   | 12  | 52  |     |     |     |     | 6   | 19              |
| Dir Office       |      |     |     |     |     |     |     |     | 4   |     |     | 4               |
| Payroll          | 41   | 26  | 35  | 53  | 23  | 14  | 1   | 2   | 1   | 1   | 1   | 28              |
| Risk Management  | 171  | 196 | 146 | 156 | 107 | 111 | 87  | 63  | 48  | 22  | 6   | 104             |
| Treasury         | 14   | 11  | 9   | 10  | 11  | 15  | 19  | 28  | 20  | 9   | 4   | 14              |
| Monthly Average  | 20   | 19  | 15  | 20  | 13  | 16  | 21  | 28  | 21  | 10  | 4   |                 |



# Comparison of Net-workdays to close to SLA (1 of 4)

| Solution Area   | Avg of Net Workdays to Close | SLA Days | Difference | # of SRs |
|---|------------------------------|----------|------------|----------|
| Filing a claim against the County   | 104                          | 1        | 103        | 86       |
| Montgomery County Government Worker's Compensation                              | 62                           | 1        | 61         | 1        |
| Renewable Energy (Energy Conservation Devices) - Property Tax Credit Conditions | 52                           | 1        | 51         | 8        |
| Definition of Washington Suburban Sanitary Commission (WSSC) Remainder          | 50                           | 1        | 49         | 1        |
| Fuel Energy Tax Return  | 50                           | 1        | 49         | 1        |
| Process to record a Deed in Montgomery County                                   | 44                           | 1        | 43         | 1        |
| Current balance of Annual, Sick, Comp, or Personal Day leave                    | 42                           | 1        | 41         | 2        |
| Business License Application/Renewal  | 40                           |          | 40         | 2        |
| County employee wants copy of paycheck or pay stub                              | 37                           | 2        | 35         | 33       |
| Property Tax credits - responsibility for calculation                           | 36                           | 1        | 35         | 1        |

**Future SLAs will measure time to complete request.**

\* Net-workdays is an Excel function that calculates the number of work days between two calendar dates. This function does not take into account holidays. Only solution areas with a difference of 10 or more days are included.



## Comparison of Net-workdays to close to SLA (2 of 4)

| Solution Area   | Avg. Net Workdays to Close | SLA Days | Difference | # of SRs |
|---|----------------------------|----------|------------|----------|
| Request changes to Federal and/or State payroll deductions                        | 36                         | 1        | 35         | 4        |
| Historic Preservation Tax Credit Description                                      | 33                         | 1        | 32         | 5        |
| Recording fees associated with a deed in Montgomery County                        | 32                         | 1        | 31         | 3        |
| Renewable Energy Devices property tax credit                                      | 31                         | 1        | 30         | 27       |
| Telephone Tax Description   | 31                         | 1        | 30         | 2        |
| Property Tax Exemptions   | 29                         | 1        | 28         | 1        |
| Location of the Department of Finance   | 28                         | 1        | 27         | 2        |
| Fuel Energy Tax Information   | 27                         | 1        | 26         | 4        |
| Energy and Environmental Design-Property Tax Credit Description (Green Buildings) | 25                         | 1        | 24         | 7        |
| Recapture of Tax credits  | 24                         | 1        | 23         | 3        |
| Requests for copy of W-2 forms  | 21                         | 1        | 20         | 11       |

**Future SLAs will measure time to complete request.**

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## Comparison of Net-workdays to close to SLA (3 of 4)

| Solution Area  | Avg. Net Workdays to Close | SLA Days | Difference | # of SRs |
|--|----------------------------|----------|------------|----------|
| Status of payment from Montgomery County                         | 19                         | 1        | 18         | 9        |
| Definition of Special Area Taxes                                 | 19                         | 1        | 18         | 1        |
| Questions regarding pay stub deduction codes                     | 20                         | 2        | 18         | 3        |
| Tax credit payment to homeowners                                 | 17                         | 1        | 16         | 21       |
| Energy Conservation Devices Property Tax Credit Requirements     | 16                         | 1        | 15         | 8        |
| Homeowner redeem property from tax lien                          | 15                         | 1        | 14         | 45       |
| Mailing tax bills for second installment and duplicate Tax Bills | 14                         | 1        | 13         | 32       |
| Rates for the County Transfer Tax fee                            | 14                         | 1        | 13         | 4        |
| Mortgage company/payment not on tax account                      | 13                         | 1        | 12         | 9        |
| Information printed on the tax bill                              | 13                         | 1        | 12         | 48       |
| Requests to discuss property tax bill                            | 13                         | 1        | 12         | 824      |
| Homeowners tax credits   | 12                         | 1        | 11         | 10       |

**Future SLAs will measure time to complete request.**

\* Net-workdays is an Excel function that calculates the number of work days between two calendar dates. This function does not take into account holidays. Only solution areas with a difference of 10 or more days are included.



# Comparison of Net-workdays to close to SLA (4 of 4)

| Solution Area  | Avg. Net Workdays to Close | SLA Days | Difference | # of SRs |
|--|----------------------------|----------|------------|----------|
| Appeal interest and penalty tax charges information                | 12                         | 1        | 11         | 12       |
| Arts and Entertainment District Tax Calculation                    | 12                         | 1        | 11         | 1        |
| Impact of mortgage refinancing to property tax payment             | 12                         | 1        | 11         | 1        |
| Non-receipt of tax bill  | 12                         | 1        | 11         | 16       |
| Updates to the address on a tax bill                               | 12                         | 1        | 11         | 10       |
| Timesheet Problem  | 12                         | 1        | 11         | 9        |
| Obtain a Tax Clearance Certificate                                 | 15                         | 5        | 10         | 26       |
| Refund requests for tax overpayment due to an assessment reduction | 20                         | 10       | 10         | 289      |
| Request refund due to overpayment of tax account                   | 20                         | 10       | 10         | 359      |

**Future SLAs will measure time to complete request.**

\* Net-workdays is an Excel function that calculates the number of work days between two calendar dates. This function does not take into account holidays. Only solution areas with a difference of 10 or more days are included.



# CountyStat Reflections on Improving Existing Practice

- **Examine current process for closing service requests within the department to ensure proper procedures are being followed**
- **Investigate opportunities to further leverage the MC311 portal to divert telephone traffic**
- **Update current Service Level Agreements (SLAs) to ensure that they are accurate**



# Wrap-Up and Follow-Up Items

